Family Financial Preparedness Checklist

Build financial resilience for unexpected events.

Pillar: Prepare

A Prepare resource for emergency savings, income interruption planning, trusted contacts, and household document access.

Action Checklist

- ☐ 1. Identify one emergency fund target.
- ☐ 2. Document recurring bills and due dates.
- ☐ 3. Choose a trusted information contact.
- ☐ 4. Store household instructions where they can be found.

Notes

Next Steps

Take the Legacy Ready Assessment. Explore Resources. Explore Financial Bliss Academy. Bring Legacy Ready to Your Organization.

Disclaimer

This resource is provided for general educational and informational purposes only. It does not constitute individualized financial, investment, insurance, tax, estate-planning, or legal advice. Financial and legal circumstances vary. Consult appropriately qualified professionals regarding decisions specific to your circumstances.